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AUTHOR Cederquist, John
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ABSTRACT

An expedition is different from other forms of overnight wilderness travel in that it involves extended time and distance in the field; it is beyond the reach of immediate rescue; and the party is self-contained regarding gear, provisions, and decision-making responsibilities. Successful expeditions may prove to be powerful, life-changing experiences. Conversely, failed expeditions may be destructive to participants' physical, psychological, or spiritual well-being. The planning phase is essential in determining which of these outcomes will prevail. Expedition planners should arrange to keep their group safe; avoid degradation of wild lands and waterways; and achieve a fulfilling, exciting adventure. Two lists are presented to assist planning. List 1, preparation activities, addresses selecting an activity, a location, and companions; holding meetings to develop goals and plans; assuring safety; arranging finances; gathering information; gathering equipment; assuring access to drinking water and food supplies; practice and trouble-shooting; and arranging transportation for people and gear. List 2, equipment groups, is prefaced with advice to apply the "Is this really needed?" test when selecting gear. Considerations covered by this list include food and water; clothing; shelter; activity items; safety; hygiene; environmental protection; critical papers such as money, travel documents, and permits; entertainment and comforts; and transportation. Two additional, essential things to take on every expedition are good judgment, which can be developed and improved through practice, and common sense, which should not be assumed to be pervasive within the group. (TD)

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EFFECTIVE EXPEDITION PLANNING

John Cederquist, M.S.
Department of Parks, Recreation and Tourism
University of Utah
Salt Lake City, Utah

This material is the basis of "Basics of Expedition Planning: How to Plan a Great Trip", a presentation of the 10th International Conference on Outdoor Recreation and Education.

Abstract

Effective planning for safe and fulfilling expeditions may be accomplished through a systematic approach. This paper focuses on essential topics to be addressed by any group planning an extended, self-supported outdoor adventure. Areas covered include pre-trip activities, categories of equipment, skills to develop, problems to anticipate, and considerations specific to international travel.

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This article does not examine all aspects of the planning experience, but is intended as a guide through which important details may be addressed. The systematic framework can be especially useful to novice planners; for the experienced "expeditioner", it may help avoid overlooking critical elements. The author initially developed a planning guide for outdoor trips in general. This expedition planning guide is an expanded version of that original, with a number of important additional considerations generously provided by colleagues listed in the SOURCES section.

Expeditions typically exist in three stages: **anticipation** (the birth of an idea, followed by planning and preparation); **experience** (the realization of the activity); **reflection** (reminiscence and memory). All participants have the ability to experience each of these stages; some prefer to focus on one over the other two. Any expeditioner with experience recognizes the importance of the serious but not unenjoyable business of effective planning. A systematic approach to the planning elements within the anticipation phase is examined in the pages that follow.

To some extent, the word "expedition" is subjective. Where a group places itself on the semantic continuum bounded by a picnic on one extreme and a season in the wilderness on the other, is the choice of the participants. Most outdoor enthusiasts would agree, however, that an expedition is distinguished from other overnight wilderness travel in that it involves extended time and distance in the field, it is beyond the reach of immediate rescue, and the party is self-contained regarding gear, provisions and decision-making responsibilities. Due to tremendous advances in equipment, technique, maps, location and communication devices, established rescue resources, and prior explorations, what used to be considered an expedition may now be seen by some as an extended outing.

Ah, not to be cut off,
not through the slightest partition

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Shut out from the law of the stars
The inner -- what is it?
if not intensified sky,
hurled through with birds and deep
with the winds of homecoming

Rainer Maria Rilke

Expedition planners usually seek excitement, relaxation or both on an extended excursion into a remote natural environment. To enjoy the experience, they arrange to do three things: keep their group safe; avoid degradation of wild lands and waterways; and achieve a fulfilling, exciting adventure. To achieve these goals, the wilderness traveler will do well to consider each of the following lists. LIST 1 describes things to do in preparation; LIST 2 names and briefly addresses equipment groups. After the planning is complete, the expedition is conducted and post-trip activities take place. Details of these two phases are not covered within the scope of this paper.

On both lists, items are not arranged in order of importance, as each one deserves careful consideration before entering an uncontrolled wilderness setting. Detailed equipment lists for specific types of expedition activities are available elsewhere.

LIST 1: 11 PREPARATION ACTIVITIES

Any one of the first three areas in this group will become the jumping off point in the planning process. The initial person or persons will focus on **WHAT** they wish to do (boating / climbing / trekking, etc.); or on **WHERE** they wish to go adventuring (Africa / U. S. Southwest / Arctic National Wildlife Refuge, etc.); or **WHO** they wish to travel with (Outdoor Program signups / family / friends / like-ability colleagues, etc.). As with every other aspect of planning, initial decisions in these three areas may have significant consequences.

SELECT AN ACTIVITY Stay within the interest area, skill level, and experience level of the group. Also consider the ease of acquiring needed gear, and other aspects as provided elsewhere on this list.

SELECT A LOCATION Determine if the location is accessible and feasible within time and financial limitations. As with each area on this list, apply the following tests: Is this realistic? Can we create acceptable alternatives if something goes awry?.

SELECT COMPANIONS Choosing group members is a decision upon which an expedition may thrive or flounder. Remember that an extended time will be spent with people you may not know well, in a remote environment that may prohibit expulsion. Good conflict resolution skills will be needed by any group.

> *One group no longer invites a friend who, long days from medical help, refused to cease diving into the opaque, shallow waters of a boulder-studded desert stream.*

As soon as other people are included, trip decisions no longer belong to

the initiator alone. It is important in the early stages to express which aspects are non-negotiable; anticipation of the most important details is therefore critical before the first meeting.

Commitment may be demonstrated by members initially paying into a non-refundable group account, by investing significant labor in the planning process, and by exhibiting positive spirit toward the endeavor.

Other attributes of importance include fitness level, specific activity skills, first aid background, and others.

Also, consider the mix of high-competency versus low-competency participants, and strangers versus friends. Groups should be assembled with similar technical abilities and attitudes regarding acceptable levels of risk. Large groups create more potential for problems and disharmony, but on the plus side, may allow better finances and distribution of labor.

> *On another trip, the presence of a .45 automatic pistol was made evident when it was discharged in the wee hours by one boater, drunk on a secret whiskey stash.*

HOLD MEETINGS TO DEVELOP GOALS AND PLANS Clear, frank discussions allow participants to understand if the adventure is within their level of interest, comfort, and commitment.

Develop a preparation time frame: if an ambitious trip, or if seeking sponsorship, at least one year of planning may be necessary. Discuss other time factors: season, length of trip, and dates. Time limitations may be related to the needs of family, work, school and important events.

Flexibility in planning is important; however, "winging it" can create problems when some don't want to change plans at the last minute. Find a balance acceptable to all group members regarding which plans are unchangeable and fixed, and which remain open to modification.

Discuss desired leadership styles and methods of reaching decisions. Determine where on the continuum between leader-led and cooperative leadership this expedition will lie. Consider whether this structure can be modified as the trip progresses.

Goals may focus on interactions among group members, on wilderness experiences as they unfold, or on a specific objective, such as a peak ascent. Individual expectations may be written out or discussed verbally. This leads to a clearer picture of group goals and reveals whether they are compatible with individual expectations. Determine if the group agrees on important goals such as safety, staying friends, and Leave No Trace.

> *In the final preparation stages for a five-week expedition, one member talked his group into the late addition of a person he met. He then dropped out, leaving on the team someone with unstated personal goals. Too late, they discovered her expectations included continuous chatter by day and interpersonal encounter sessions by night.*

Determine whether a written agreement regarding expedition details is needed. Written agreements are essential if running the trip through an organization. Whether written or verbal, cover: liability issues, responsibility to each other, and to gear. If the trip is organized among family or trusted friends, oral agreements may be adequate, but state them in the presence of the entire group.

Leadership responsibilities assumed by participants may include logistics, hazard management, finances, research, route finding, transportation, food, etc. Each person will need to contribute, and will enjoy the accompanying feeling of trip ownership.

Determine to what extent skill levels must be in place, and to what extent they may be developed *en route*.

Consider what equipment and food to take versus what to acquire at the expedition location. It may be a mistake to depend on distant sources for critical gear and groceries.

Discuss what levels of personal hygiene are likely to be possible.

Insurance issues may include life, medical, and property policies. Determine if these are in effect for the type and location of the trip.

Additional points for discussion include tobacco and alcohol use, current and past medical conditions, training for fitness, and behavioral matters.

ASSURE SAFETY This area is not distinct from any of the others on this list. For example, assembling the wrong collection of participants, or designing a trip that exceeds the abilities of the group may have dire safety consequences.

> *Two open canoeists from Iowa planned to float the length of the Colorado River. Prior to launch, they wisely changed plans after hearing of "rough water" in a canyon called Cataract.*

Keep a packet of survival articles for surprise situations: water, food, 1st aid, warm clothes, toiletries, medications, sun protection.

Prepare a minimum of two sets of maps. In the planning stages, study them carefully: look for hazards, plan escape routes and design alternatives. Don't assume complete accuracy on any map.

Develop information packets, including a trip synopsis, copies of routes, timetables, permits and other documents. Each member may wish to have a packet, and copies should be left behind with significant others or agency sponsors. At least two packets should be carried, separately, on the expedition. Maps and other critical documents must be protected against water damage and loss.

Plan for accidental separation. Communication is an important area for discussion, including phone access and radio issues.

On some trips, it is appropriate to register with, or at least notify, local authorities.

Critical medications should be carried in duplicate quantities by separate group members.

Take efficient, but not excessive, 1st aid and repair kits. Know how to use the contents; at least some group members should be certified in first aid and CPR.

A good overall approach to safety is to assume problems will arise: hope for the best, but plan for the worst.

ARRANGE FINANCES Prepare money: travelers checks are not always convenient; however, carrying significant amounts of cash may be unwise.

Consider a separate account, to include group money, emergency funds, and deposits against loss that may occur during the trip.

A "Back-out" clause may be appropriate, in which members know what financial penalties will be assessed by the group against individuals who cancel before or during the expedition.

Financial impact may be higher if the group waits too long to buy needed gear, due to the inefficiencies of missed sales and lost opportunities for comparative shopping. Equipment ordered with inadequate lead time may not arrive when needed. Likewise, flight, ferry, and lodging may prove more expensive if not confirmed early on.

GATHER INFORMATION Formulate detailed lists, using the general guidelines found on LIST 2, below. Think through a full day of the expedition: What information is needed to make this day work?

Read books, journals and guidebooks, talk to those who know the area, and make pertinent notes. Locate important information early: topographic maps, tide tables, etc. Computers are making it increasingly easy to access information.

Additional areas for research: history of area, local availability of water, food and gear, private property issues, etc.

Especially when on site, exercise caution in accepting the information of "locals"; comments may be useful and accurate, or otherwise.

GATHER EQUIPMENT Decide whether to use gear owned by group members, or to buy new equipment, or to borrow, or to rent. After determining what is necessary, apply some important tests to gear selection: pick what is necessary, reliable, durable, lightweight, and easily repaired.

During the planning stage, determine who will own group equipment at the end of the trip, and how equipment damage or loss will be managed.

Consider what to take versus what to acquire at the expedition location.

Avoid waiting until the expedition starts to use brand-new or borrowed gear for the first time. Likewise, avoid using equipment that is on the brink of failure from overuse.

Determine which items are most critical, and where possible, bring duplicates. Glasses, medications, 1st aid, sun protection and certain other items should be carried in multiples, by separate group members, in secure containers.

ASSURE ACCESS TO DRINKING WATER AND PREPARE FOOD

Decide how to package, resupply, and cache supplies.

Determine calories needed, nutritional value, weight, preservability, emergency supplies, food allergies and preferences, variety, and ease of preparation.

An arctic storm delayed by eleven days the bush plane pick-up of four climbers. By preparing for such an emergency, they had extra noodles to eat, and fuel to melt snow for drinking water.

Explore issues related to fuel: quantity, type, and transport. Avoid multiple models of stoves and other gear.

Avoid dependence on food found in the wild, as availability can't be assured. Don't eat wild plants and animals unless certain of safety and aware of ecological considerations.

PRACTICE, TROUBLE-SHOOT Experience one or more "shakedown cruises". Duplicate expected conditions and circumstances to allow potential problems to arise. Test equipment, group members, relationships, and systems. It is better to encounter glitches and learn to deal with them before committing to the wilderness.

ARRANGE TRANSPORTATION FOR PEOPLE AND GEAR

Consider roads, trails, vehicular preparedness and other aspects of access. Where possible, reduce the volume and weight of gear and consumables to increase transportation ease and avoid the problems of pre-shipping. If it is necessary to ship in advance, research details carefully: Where will it go? Who will receive and store it? If things go awry, what alternatives are there?

Carrying frequently-used items in a daypack during transportation can avoid flailing through expedition duffel. Consider the difficulty of hand transportation when packing. Pack gear to avoid subsequent repacking.

LIST 2: 10 EQUIPMENT GROUPS

Many considerations for this list are addressed under subtopics of LIST 1. Apply the "Is this really needed?" test when selecting gear. While it is difficult to overplan, it is easy to overpack.

FOOD AND WATER This is typically a much more labor-intensive planning and preparation stage than group members realize.

Availability and safety of drinking water are critical. Determine to what extent water may be carried, found fresh (rare), heat-treated, chemically treated, or filtered. Most groups use some combination of these techniques.

In addition to the time-consuming process of planning and preparing food, address kitchen and cleanup needs. Containers should reliably protect food from contamination and critter invasions.

CLOTHING Good choices for clothing: items that protect, fit comfortably, clean well, and remain functional. Clothes that are hard to clean or dry or that lack durability are poor choices. Dark clothing looks better over time. Dark clothes can be uncomfortable in hot weather, but are beneficial when it's sunny and cold.

Most important, of course, is to choose clothing that enhances safety. The "killer cloth" (cotton) is wonderful for hot, dry climates, but almost every expedition will require clothes that create dry warmth: water/wind barriers and synthetic fleeces or wool. Footwear choices are also critical.

SHELTER Tents, sleeping bags, pads, tarps and other shelter items must pass the durability and reliability tests. For most trips, err on the side of warmer and drier. As with stoves and other gear typically taken in multiple quantities, use of identical models increases the ability to pirate parts, and reduces the needed range of repair materials and tools.

ACTIVITY ITEMS These include the boats / climbing hardware / snow travel gear, etc. that make the expedition possible. Apply standard tests; include extras where possible; bring the repair kits.

SAFETY As with the "Assure Safety" section in LIST 1, safety items are an element of every subgroup in LIST 2: forgotten kitchen cleanup items may result in Salmonella infections; a broken sleeping bag zipper may create hypothermia.

HYGIENE Include packaged, moist wipes that clean without additional soap. These dry quickly and can be easily isolated and packed out. Soaps and other items should be considered with care.

ENVIRONMENTAL PROTECTION Assure group members have a common (and high) standard for disposal of human waste, and that they support "Pack it in, pack it out" ethics. Determine how the group will handle protecting wild lands and waters, and the living communities they support.

CRITICAL PAPER: MONEY, TRAVEL DOCUMENTS, PERMITS

It may be wise to distribute portions of group money among group members. Check travel documents and permits for presence, completeness, and security of location.

ENTERTAINMENT AND COMFORTS Sealing a change of clothes in a plastic

bag can make more pleasant a day in town, or the return trip home. Reading material can be a joy, especially for unplanned pauses. Volume and weight can be cut by rotating books among the group.

On an Alaska coastal canoeing adventure, one party was so laden with unneeded extras such as chairs, extra tackle and camp toys, that a power boat was necessary to get them to the first site.

TRANSPORTATION Extraction gear, extra fuel, tools, manuals and documentation may all be important. Keep travel tickets secure; re-check schedules.

Useful skills and areas of knowledge to hone, prior to departure

Environmental ethics, Leave No Trace principles, safety, leadership, group behavior, communications, camping skills, rations, menus, cooking, equipment use, clothing selection and care, health and sanitation, travel techniques, route finding, map, compass, use of radio and positioning systems, survival, first aid, emergency procedures, weather evaluation, natural and cultural history, trip planning, specific activity skills, judgment.

Potential problems to be addressed, prior to departure

Thorough anticipation of problems encourages better training, improved communication, better gear selection, and development of useful alternate plans.

The following list is not comprehensive. Many expeditions will encounter a number of these challenges: wind, dust, difficult terrain or water conditions, snow, cold, ice, poor light conditions, rain, heat, scarce or tainted food or water, equipment or vehicle failure, dangerous or nuisance animals and plants, poor group or individual behavior, injury, fatigue (physical, mental, or emotional), problems with other groups or individuals, "get-home-itis", "stay-longer-itis".

I've been on single trips where most of these challenges have occurred.

Considerations for expeditions outside the United States

These include obtaining visas, passports, permits, and inoculations (allow ample lead time); respecting local laws and customs; researching local holidays and bureaucratic regulations. Don't assume agencies are run according to U. S. standards.

Photocopy passports, visas, immunization booklets, permits, etc. in case of loss; each member carries photocopies of group documents with her or his paperwork packet. Bring prescription medications in original containers, so contents may be easily verified by customs personnel.

"Background Notes" are available on many countries, from the U. S. Government Printing Office (202) 512-1800.

Emergencies to anticipate may include natural or societal disasters.

Assure the presence of emergency water, food and clothing even on flights or overland travel, as the group may be stuck in places for many hours without these critical items.

Conclusion

There are two additional, essential things to take on every expedition: common sense and good judgment. Like most skills, judgment can be developed and improved through practice, and by thinking cautiously in all situations that require care. A crucial time to use these skills is when deciding what to do, where to do it, and who to include in your group. Common sense is not necessarily pervasive within an expedition team, and it may be a mistake to assume a group member is in possession of it. If common sense is not an innate characteristic, promote GOOD sense.

Successful expeditions may prove to be powerful, life-changing experiences for people. Conversely, failed expeditions may be destructive to their physical, psychological, or spiritual well-being. The planning phase is essential in determining which of these outcomes will prevail.

SLEEPING IN THE FOREST

I thought the earth
remembered me, she
took me back so tenderly, arranging
her dark skirts, her pockets
full of lichens and seeds. I slept
as never before, a stone
on the riverbed, nothing
between me and the white fire of the stars
but my thoughts, and they floated
light as moths among the branches
of the perfect trees. All night
I heard the small kingdoms breathing
around me, the insects, and the birds
who do their work in the darkness. All night
I rose and fell, as if in water, grappling
with a luminous doom. By morning
I had vanished at least a dozen times
into something better.

Mary Oliver

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